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a survey of visitors to the SHAW FESTIVAL THEATRE

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ONTARIO, CANADA
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Travel research branch

THE ONTARIO DEPARTMENT OF TOURISM AND INFORMATION

Hon. James Auld, Minister

A. S. Bray, Deputy Minister



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A Survey of Visitors to the SHAW FESTIVAL THEATRE

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THE ONTARIO DEPARTMENT OF TOURISM AND INFORMATION

Parliament Buildings
Toronto, Ontario

June, 1969

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PURPOSE AND INTRODUCTION

Complying with a request made in 1968 by the Honourable James Auld, Minister of the Department of Tourism and Information, the following report on the Shaw Festival was formulated dealing with its impact on the tourist market in the Niagara-on-the-Lake region.

However, to deal solely with the impact and significance of the Shaw Festival would be to slant the report in one particular direction, which would be of little value or purpose. So, in order to give the Theatre a proper setting, the geographical, cultural, historical and scenic attributes of the entire Niagara Frontier are presented as an essential part of the total impact of this cultural attraction. All these elements form the back-drop which contribute to making the cultural attraction of the Shaw Festival the successful enterprise it is today.

APPENDIX B

Chapter 10 of the book is a review of the literature on the effects of social support on health. It discusses the theoretical basis for the effects of social support, the methods used to study the effects of social support, and the findings of the research. The chapter also discusses the implications of the research for practice and policy.

SUMMARY AND RECOMMENDATIONS

The analysis of the impact of the Shaw Festival on Niagara-on-the-Lake was based on a questionnaire sent to 2,000 patrons of the Festival. There were 949 usable returns which formed the information base for analysis. The methodology is further described in an appendix. The results of this analysis of the social characteristics and economic impact of the patrons of the Shaw Festival are given in summary form.

Visitor Characteristics

Patrons of the Shaw Festival are drawn from Ontario's "Golden Horseshoe", Toronto, Hamilton, St. Catharines and from Buffalo and other nearby New York State centres. For the most part, patrons to the Shaw Festival arrive in parties comprising two to four persons, the average party size being 3.36. The Theatre appeals to the more mature age grouping. Of the audiences, 71.7 per cent were above 35 years of age. The average age of respondent party-heads was 42.7 years. These persons tended to be professionals (29.4%) or from teaching, management, or clerical occupations (a further 35.5%).

Trip Characteristics

Though the average length of trip per respondent-party proved to be 1.4 days, approximately 82 per cent of the patrons stayed only one day or less. The aforementioned suggests that the impact of the Shaw Festival Theatre is, to a great extent, confined to an area where people may commute from their homes to the Theatre, returning to their homes that same day. The high incidence of repeat visitors to Niagara-on-the-Lake (82%) would seem to indicate that once attracted to the area, it is highly probable that visitors will return again, and again.

Supporting Facilities

Respondent-parties visiting Niagara-on-the-Lake used two or three facilities including the Theatre. Around 60 per cent of all theatre parties dined out using commercial facilities. If picnic facilities, restaurants and beverage rooms are included, the percentage is increased to 80 per cent.

Approximately 60 per cent patronized a gas station or a shop. Only 15 per cent used overnight accommodation. In the light of this analysis, theatre parties should be viewed as having a package of interests which involves dining out, shopping, and sight-seeing.

Visitor Expenditures

The average expenditure made per respondent-party on their trip to Niagara-on-the-Lake was \$52.51—\$33.78 of which was spent on facilities used during their stay in the town. Of this, an average of \$14.09 was spent on the Theatre itself. An estimated total of \$420,080 was expended by all respondent-parties of all trip types to the area of which \$270,240 was spent in Niagara-on-the-Lake.

Visitor Attitudes

As expected, the main reason given by respondent-parties for visiting Niagara-on-the-Lake was the Shaw Festival. However, an important fact brought out by the sample was that the Shaw Festival created an awareness of the town of Niagara-on-the-Lake for the first time in 54.9 per cent of the respondents. Moreover, the Shaw Festival accounted for 55.6 per cent of the reasons given by respondents for making repeat visits to the area. Reasons of pleasure and recreation accounted for only 24.0 per cent.

RECOMMENDATIONS

The following recommendations arise from the analysis of the impact of the Shaw Festival on Niagara-on-the-Lake. The impact, combined with the other exciting historical-cultural developments in this area, provides both social and economic opportunities. The realization of these opportunities, in a manner sympathetic to the historical and scenic attractiveness of Niagara-on-the-Lake, can produce an outstanding historical-cultural asset to the tourism recreation development of Ontario's Niagara Frontier making it one of international importance.

- (a) With regard to the Shaw Festival Theatre, the major problem is that of audience capacity. Now operating at full capacity, the Theatre is forced to turn away many would-be patrons. An increase in capacity would facilitate a greater penetration into the market area with consequent spin-off benefits to the entire Niagara Frontier. Thus, needless to say, though the Old Court House has adequately served the original functions of the Shaw Festival, its audience capacity must be increased in order to accommodate the growing number of patrons to the Shaw Festival.
- (b) Patrons' needs should be carefully considered as a package of interests that could include: a variety of special events, dining out, shopping and sight-seeing in Niagara-on-the-Lake. Accommodating these needs would increase the pleasurable experience of going to the Theatre and thereby supplement the attractiveness of the Festival itself.
- (c) When facility problems are solved and market area penetration in depth becomes possible, more emphasis may be put on attracting patrons from more distant points, particularly from major cities in nearby United States.
- (d) As a result of the increasing development of the scenic, cultural and historic attributes of the area, opportunities for investment in supporting tourist facilities, such as restaurants and overnight accommodation, will inevitably be increased. However, development of these supporting facilities must be carefully integrated into the existing fabric of the Town so as to preserve the unique historical and scenic resources on which tourism depends.

THE CHARACTERISTICS OF VISITOR PARTIES

Several sections of the questionnaire were related to selected characteristics of the visitor-parties. The results of the responses obtained are summarized in this section of the report and the more salient patterns which were revealed through analysis of the report are briefly discussed.

Origin of Visitor Pattern or the Market Area

About 71 per cent of the respondents to this portion of the questionnaire resided in Canada and 27 per cent in the United States. In comparison, about 51 per cent of the visitors to the Stratford Festival in 1966 were Americans ⁽ⁱ⁾ indicating that even though Niagara-on-the-Lake is adjacent to the border, the Shaw Festival has not penetrated the American market as effectively as it may have up to the present time.

Approximately 95 per cent of those replying resided in Ontario or New York State. The Theatre, therefore, appears to have a limited attraction, at the present time, for those living in more distant Provinces and States.

Origins of Respondents

Place of Residence	Number of Respondent-Parties	Per Cent	
(a) CANADA			
Toronto.....	359	37.8%	} Province of Ontario=70.3%
St. Catharines.....	52	5.5	
Hamilton/Burlington.....	50	5.3	
Niagara Falls.....	22	2.3	
Ottawa.....	8	0.8	
Other Ontario points.....	176	18.6	
Montreal.....	6	0.6	
Other Canada.....	4	0.4	
Sub-Total—Canada.....	677	71.3%	
(b) UNITED STATES			
Buffalo.....	137	14.4%	} New York State=25.1%
Lewiston.....	12	1.3	
Niagara Falls.....	22	2.3	
Rochester.....	14	1.5	
Other New York State.....	53	5.6	
Other U.S.A.....	17	1.8	
Sub-Total—U.S.A.....	255	26.9%	
(c) Did Not State.....	17	1.8	
TOTAL.....	949	100.0%	

(i) *Stratford Visitor Survey, 1967*, Travel Research Branch, Ontario Department of Tourism and Information, Table XX.

The geographic limit of the major immediate market area can be more precisely defined as the Metro Toronto Horseshoe and the adjacent Canadian and American communities of the Niagara Frontier. Residents of these areas constituted 68.9 per cent of all respondent-parties. Of this group 50.9 per cent lived in Canada and 18 per cent in the United States.

Other points in Ontario and New York State were the place of residence of 26.5 per cent of the respondent-parties. Worthy of note is that distant large urban centres such as Ottawa and Rochester were only weakly represented.

The incidence of visitors to the Shaw Festival Theatre per 10,000 population for a number of cities in the primary market area provides an additional measure of the magnetism derived by the event as indicated in the following table.

But before commencing, a brief explanation of the method used to arrive at the incidence of visitors shown in the right-hand column would be deemed appropriate. The total number of parties attending the Theatre numbered approximately 8,000. The percentage of visitors from each centre as indicated in the sample is evidenced in the previous table (Toronto—37.8%, St. Catharines—5.5%, etc.). The total number of parties from each centre can now be calculated. For example:

$$\text{Toronto} - \frac{8,000 \times 37.8}{100} = 3,024$$

The average number of persons per respondent-party was 3.36. Assessed populations were derived from sources indicated.

City	Per Cent of Respondent- Parties	Estimated Number of Respondent- Parties for Universe of 8,000	Average Number per Respondent- Party	Estimated Number of Visitors	Assessed Population*	Incidence of Visitors per 10,000 Population
	(1)	(2)	(3)	(2) x (3) = (4)	(5)	(4) ÷ (5) = (6)
St. Catharines.....	5.5%	440	3.36	1,478	98,059	150.7
Toronto.....	37.8	3,024	3.36	10,161	1,847,359	55.0
Hamilton.....	5.3	424	3.36	1,425	288,993	49.3
Buffalo.....	14.4	1,152	3.36	3,871	1,323,000**	29.3
Niagara Falls, Ontario....	2.3	184	3.36	618	55,994	110.4

Source: (*) 1968 Municipal Directory, Ontario Department of Municipal Affairs

(**) U.S. Statistical Year Book, 1968

The highest incidence of visitors per 10,000 population (150.7) prevails in St. Catharines which is only 15 miles from Niagara-on-the-Lake; Niagara Falls, Ontario, which is only 12 miles distant, was the second highest with 110.4.

Interestingly, the incidence factor for Toronto (55.0) is 11.6 per cent above that of Hamilton's (49.3) although the travelling distance is about 40 miles greater. The incidence of visitors from Buffalo, which is located within easy driving distance of Niagara-on-the-Lake is only 53.3 per cent of that of Toronto and 59.4 per cent of that of Hamilton. Accounting for this low incidence of visitors is the possible explanation that the border exerts a depressing effect in the more local market structure of the Shaw Festival—a factor not prevalent in the more international market character of the Stratford Festival.

Party Size

The pattern revealed from the analysis of the replies to the questionnaire is generally comparable with that prevailing at special events of this type in Canada and the United States. There are some interesting minor variations with results obtained in a recent study of visitors to the Stratford Shakespearean Festival. ⁽ⁱ⁾

(i) *Stratford Visitor Survey*, 1967, Travel Research Branch, Ontario Department of Tourism and Information, Table II.

The average number of persons per party was 3.36. This is somewhat higher than the average of 2.9 revealed in the Stratford Study of 1966.

Number of Persons in Party Attending the Shaw Festival Theatre

Number of Persons in Party	Number of Respondent-Parties	Per Cent
One.....	20	2.2%
Two.....	394	41.5
Three.....	113	11.9
Four.....	281	29.6
Five.....	39	4.1
Six.....	63	6.6
Seven or more.....	38	4.0
Did Not State.....	1	0.1
TOTAL.....	949	100.0%

Parties of two were most common representing 41.5 per cent of all respondent groups. The comparable ratio for the Stratford Shakespearean Festival Theatre was 49 per cent.

Parties of four were the second most common size. The ratio of 29.6 per cent is slightly above the 21.9 per cent value obtained in the Stratford Study.

The third most common party grouping was three, accounting for 11.9 per cent. The corresponding value for the Stratford Study was 12.4 per cent.

Parties of one formed only 2.2 per cent of the total. This is substantially below the comparable ratio of 7.1 per cent obtained in the Stratford Study.

Groups of five or more represented 14.7 per cent of the parties responding to this question. In the Stratford Study, parties of this size totalled 9.6 per cent.

Age of Party Heads and Visitors

The average age of respondent party-heads attending the Shaw Festival Theatre was 42.7 years. Altogether, about 71.7 per cent of respondent party-heads were 35 years or more in age; of this total, 34.5 per cent were over 50 years of age.

Age of Respondent Party-Heads Attending the Shaw Festival Theatre

Age Groups of Respondent Party-Heads	Number of Respondent-Parties	Per Cent
20 years or less.....	24	2.5%
20-34 years.....	237	25.0
35-49 years.....	353	37.2
50 years and over.....	327	34.5
Did Not State.....	8	0.8
TOTAL.....	949	100.0%

Average Age of Respondent Party-Heads = 42.7 Years

Teenage party-heads were weakly represented forming only 2.5 per cent of those responding to the question.

Adult women 18 years or over in age made up 52.5 per cent of the volume attendance in the sampled parties while adult males formed 43.3 per cent. Comparable ratios in the Stratford Study were 50.1 per cent for females and 41.3 per cent for males.

Teenagers between 13 and 17 years of age totalled only 3.2 per cent. The comparable ratio for this age group in the Stratford Study was 5.5 per cent. Children less than 13 years of age accounted for another 1.0 per cent. In the Stratford Survey, this age group constituted 3.2 per cent of the audience. Apparently the Shaw Festival Theatre attracts fewer teenagers and children than does the Shakespearean Festival at Stratford. This may be due to the fact that, being as it is, the school curriculum orientates this market group towards the works of Shakespeare. Furthermore, keeping this market in mind, the Shakespearean Festival at Stratford conducts a series of performances specifically designed for the student.

Occupation of Party Head

The professional, teaching, clerical and managerial concerns accounted for 64.9 per cent of the occupations of all respondent party-heads. Approximately the same percentage was revealed in the Stratford Visitors Survey.

Occupation of Respondent Party-Heads

Type of Occupation	Number of Respondent Party-Heads	Per Cent
Professional.	279	29.4 %
Teacher/Professor.	130	13.7
Clerical/Office.	129	13.6
Managerial/Owner.	78	8.2
Housekeeper/Housewife.	66	7.0
Retired.	42	4.4
Student.	35	3.7
Sales.	31	3.3
Skilled Labour.	24	2.5
Farming.	4	0.4
Unskilled Labour.	2	0.2
Armed Forces/Police/Ambulance.	2	0.2
Priest/Minister.	2	0.2
Other.	49	5.2
Did Not State.	76	8.0
TOTAL.	949	100.0 %

} 64.9%

The professional group is decidedly dominant displaying a ratio of 29.4 per cent. This was 2.1 times that of the second highest occupational grouping—that of the teacher/professor which accounted for 13.7 per cent of the total occupations.

The respondent party-head was a retired person in only 4.4 per cent of the respondent groups. The comparable ratio for the Stratford Study was 5.4 per cent.

Students formed 3.7 per cent of the respondent party-heads in the sample. They represented 5.7 per cent of the respondents in the Stratford Study.

TRIP CHARACTERISTICS

In this section of the report, an analysis is made of trip characteristics. In other words, the information we will be concerned with relates to the length of time spent in the Town of Niagara-on-the-Lake; the communities visited and passed through by respondent-parties on their trip to the Shaw Festival Theatre; the number of first-time and repeat visitors to Niagara-on-the-Lake; the mode of transportation used by respondent-parties and the difficulties, if any, in finding directions to Niagara-on-the-Lake. We will also be discussing and analysing why respondent-parties did not stay in Niagara-on-the-Lake or the vicinity overnight, and the points of interest visited by respondent-parties while in the vicinity. Finally, a comparison will be made of the frequency of visits to the Theatre, the Town and the area.

Length of Trip Time

The length of time spent on trips to Niagara-on-the-Lake by patrons of the Shaw Festival, as shown in Table I, was rather short averaging only 1.4 days per respondent-party. In almost 82 per cent of the cases, trips were of only a half-day or a day's duration which would seem to substantiate the main purpose for visiting Niagara-on-the-Lake, that of visiting the Shaw Festival Theatre. In very few instances were trips included as a part of a vacation.

Time Spent at Niagara-on-the-Lake

Table II adds validity to the fact that, in the majority of cases, respondent-parties came to Niagara-on-the-Lake primarily to see the Shaw Festival productions. The average time spent in Niagara-on-the-Lake per respondent-party was 0.63 days indicating the time spent in the Town was actually less than the time required to reach it.

In the Stratford Visitor Study⁽¹⁾, it was found that approximately 26 per cent of visitors stayed one night in Stratford, and 48 per cent of visitors remained in Stratford from two to four nights, whereas in the Niagara-on-the-Lake Study, approximately 85 per cent of its visitors did not stay overnight. This difference between the two Festivals in trip characteristics of respondent-parties could be due to the fact that at Stratford, a different play is shown on alternate nights, while the Shaw Festival runs the same play consecutively for two or three weeks. This reason underlying the disparity is an assumption which cannot be substantiated by statistical data; of course, one could easily argue that the reason for the difference is the fact that the Town of Stratford has more accommodation facilities available to its visitors than does the Town of Niagara-on-the-Lake.

Other arguments could be cited to account for the discrepancy between the length of time spent by visitors to Stratford and visitors to Niagara-on-the-Lake, one being the fact that slightly over 50 per cent of the audience at Stratford is comprised of Americans, originating mainly from the States of New York (10.5%), Michigan (23.0%) and Ohio (5.9%). Only 26.9 per cent of the audience at Niagara-on-the-Lake is American, and practically all come from nearby New York State.

Assuredly, after reviewing accommodation, entertainment and other tourist facilities in the area, it might be advisable to take all these factors into consideration. Implementation of these implied suggestions, combined with the additional historical and cultural attractions in the area, along with an increase in capacity of present tourist facilities, would soon prove beneficial in increasing the market scope of the Shaw Festival, and lead to a greater length of stay of respondent-parties.

Communities Visited

Table III shows communities visited or passed through by respondent-parties on their trip to Niagara-on-the-Lake. Of the 949 respondent-parties included in the sample, 60.9 per cent stated

Note: (1) *Stratford Visitor Study*, 1967, Travel Research Branch, Ontario Department of Tourism and Information, Table IV.

that they had passed through a community or a number of communities on their trip to Niagara-on-the-Lake. However, only 50.3 per cent of the total number of respondent-parties actually visited a community, or communities en route. Since the average time away from home was very short and the origin of visitors indicates that many would be able to travel direct to Niagara-on-the-Lake, these figures are to be expected.

The main communities visited, in descending order, were as follows:

Main Communities Visited

Selected Community	Per Cent of Respondent-Parties
Niagara Falls, Ontario.....	19.0%
St. Catharines.....	8.4
Toronto.....	5.4
Niagara Falls, New York.....	4.0
Hamilton.....	3.4

First Visit

Of the 949 respondent-parties shown in the following table, 781 were repeat visitors and a minority of 157 were first-time visitors to Niagara-on-the-Lake.

Respondent-Party's First Trip to Niagara-on-the-Lake

Replies	Number of Respondent-Parties	Per Cent
Yes.....	157	16.5%
No.....	781	82.3
Did Not State.....	11	1.2
TOTAL.....	949	100.0%

In the tourism industry, the accepted ratio of first-time to repeat visitors for a geographical unit, such as Florida or Ontario, is 30:70. That is to say that, in general, in order to progress, a tourist area should attract an approximate 30 per cent of new visitors every year. This same ratio could be applied to a greater or lesser degree, to attractions at Niagara-on-the-Lake, including the Theatre. With this viewpoint, we are enabled to say that a percentage of only 16.5 per cent of new visitors each year to the Theatre is not satisfactory. The administration should aim for a higher quota of first-time patrons for the purpose of securing a more progressive growth rate.

However, we must bear in mind that the demand for Shaw Festival Theatre tickets is far greater than the supply. The Theatre is already playing to full capacity audiences, and perhaps many would-be first-time visitors are being turned away because there are no more seats available. With the actualization of the proposed expansion of the Theatre, this ratio of first-time to repeat visitors might prove to be more acceptable.

Mode of Transportation

Respondents' answers to the question on the type of transportation used on their trip to Niagara-on-the-Lake reveal that the Shaw Festival Theatre is definitely passenger-car oriented. Of the total 949 respondent-parties, 95.3 per cent indicated that they used this mode of transportation. Only 0.8 per cent came by bus; some 3.9 per cent made no response.

With such a high percentage of respondent-parties using the car as their vehicle of transportation, adequate road signs, wayside road facilities and parking accommodation will become a necessary part of any theatre relocation and/or expansion.

Moreover, it must be borne in mind that this survey deals with only those respondent-parties who were patrons of the Shaw Festival Theatre. If public transportation to the area was made readily available, other citizens might be induced to visit Niagara-on-the-Lake and its Shaw Festival.

Type of Transportation used by Respondent-Parties on Trip to Niagara-on-the-Lake

Type	Number of Respondent-Parties	Per Cent
Car.....	904	95.3 %
Bus.....	8	0.8
Train.....	—	—
Plane.....	—	—
Did Not State.....	37	3.9
TOTAL.....	949	100.0 %

Travel Difficulties

The majority of respondent-parties (88.3 %) had no difficulty in reaching Niagara-on-the-Lake; 9.2 per cent indicated that they had some difficulty and 2.5 per cent of the respondents did not reply to this question. However, since the majority of respondent-parties (82.3 %) had made a previous visit to Niagara-on-the-Lake, it cannot be directly concluded that road directions to Niagara-on-the-Lake are adequate.

Respondent-Parties' Experience of Difficulty in Getting to Niagara-on-the-Lake

Any Difficulty	Number of Respondent-Parties	Per Cent
Yes.....	87	9.2 %
No.....	838	88.3
Did Not State.....	24	2.5
TOTAL.....	949	100.0 %

Reasons for not Staying Overnight

In reply to the question regarding "reasons for not staying in the immediate vicinity of Niagara-on-the-Lake overnight", most respondent-parties (71.6 %) attended the Theatre performance and returned to their homes that same night. However, 6.7 per cent of the total respondent-parties did state that the lack of accommodation was their reason for not staying overnight.

Of the respondent-parties, 2.6 per cent had not thought of Niagara-on-the-Lake as "a place to stay". Another 2.6 per cent did not stay overnight because they believed there was a lack of "things to do" in the community.

Of the small number of patrons who were also campers or trailerites, 0.4 per cent stated they did not stay at Niagara-on-the-Lake overnight because of the lack of campsites and trailer facilities.

Approximately 7 per cent of the respondent-parties did not give any specific reason for not staying overnight, while another 9 per cent did not reply to the question.

Points of Interest Visited

The majority of respondent-parties (58.6 %) did not stop at selected points of interest other than the Theatre. In contrast, as shown in Table V, 41.4 per cent of the respondent-parties did stop at local points of interest such as Niagara Falls, Queenston Heights and old churches in the vicinity.

Average Number of Visits

According to Table VI, the average number of visits to the Theatre per respondent-party was 3.5; the average number of visits per respondent-party to the Town of Niagara-on-the-Lake was 5.8. In general, these figures disclose the fact that patrons of the Shaw Festival had visited the town almost six times prior to their present visit, and had visited the general area almost eight times previously.

SUPPORTING FACILITIES AND ACTIVITIES

In addition to patronizing the Shaw Festival Productions, respondents made use of other facilities both local and en route. An examination of the usage of these facilities, their visitor ratings, and other activities in which visitors participated will give the visitor-impact on these other facilities and an insight into the opportunities for improving the total tourist plant to create an even better attraction than exists at the present moment.

Usage of Supporting Facilities

The type of facilities utilized and the number of respondent-parties that used them are shown in Tables VII to X.

Altogether, 949 respondent-parties used the 24 facilities listed (including the Shaw Festival Theatre) for a total of 2,688 times, each party using an average of 2.8 facilities. Those facilities most frequently used are listed in descending order below:

Facilities Used by Respondent-Parties While at Niagara-on-the-Lake

Facility	Number of Respondent-Parties
Restaurants and dining rooms	569
Retail stores	296
Service stations	157
Picnic areas	120
Parks	103
Drug stores	97
Hotel rooms	90
Public beverage rooms	68
Motel rooms	44
Friends' homes	27

Almost 60 per cent of all respondent-parties patronized local dining facilities. If picnic areas and beverage rooms are included the figure is raised to approximately 80 per cent.

Commercial overnight accommodations were utilized by about 15 per cent of all respondent-parties; over 60 per cent used other retail outlets which gives an indication of the spin-off benefits of the Festival to the local area.

Supporting Facilities Used En Route

Facilities were also patronized en route. Table VIII shows the combined usage of facilities at Niagara-on-the-Lake and en route. Of the total number of times (3,077) that facilities were used by respondent-parties throughout the trip 2,688 of these occurred at Niagara-on-the-Lake. Patterns between local and en route usage of all facilities proved to be similar.

Participation in Other Activities

Given the short length of stay, most parties did not have time to participate in other activities. Table IX shows that only 31 per cent of respondent-parties engaged in the seven activities mentioned, other than attending the Shaw Festival Theatre. However, picnicking as part of a dining out function does rate strongly.

Facility Ratings

Visitors were also asked to rate the facilities used, and this is shown in Table X.

The greatest number of comments received (503 out of 949) concerned the quality of restaurant food, 70.8 per cent of respondent-parties indicating that, in their opinion, the quality of the food ranged from "good" to "excellent". Of the total 81 respondents replying to this question, 63 per cent passed a "poor" to "fair" judgement on the closing hours.

The second highest negative rating was given to hotel/motel accommodation, as 44.6 per cent of a total of 195 respondents considered this type of facility to be "fair" or "poor". More specifically, 20.5 per cent of these respondents thought the accommodation "fair" and 24.1 per cent rated it as "poor". Local tourist accommodations must be elevated to those standards demanded by visitors simply for the purpose of retaining present visitors to the area.

Almost 40 per cent of the 79 respondents commenting on local taverns rated them "fair" or "poor".

Recreational facilities provided for children were commented upon by 29 respondent-parties, 41.4 per cent of them considering these amenities "fair" or "poor".

In summary, the average visitor to the Shaw Festival may be said to have a package of interests when he visits the Theatre. In addition to attending performances, he is also interested in dining out, enjoying the pleasant surroundings, and patronizing the local shops. Business opportunities are provided in catering to these interests. New historical, cultural and recreational facilities in a high quality setting would encourage more extended visits to the local area increasing the potential economic impact. A careful integration of tourist facilities is essential for the sake of preserving the attractive qualities of Niagara-on-the-Lake and enhancing its unique historical and cultural character.

EXPENDITURE PATTERNS

Information was obtained in the questionnaire with respect to total costs incurred for the entire trip to the Shaw Festival (exclusive of transportation), and total expenditures in Niagara-on-the-Lake. A more detailed breakdown of these costs by commodity and service was also obtained. The results of the analysis of the data obtained are now summarized.

Total Expenditure for the Entire Trip

The estimated overall expenditure per respondent-party visiting the Shaw Festival was \$52.51. Since there was an average of 3.36 persons per party the average expenditure per individual amounted to \$15.63. Estimated total trip expenditure by all respondent-parties was approximately \$49,840.

Estimated Overall Trip Expenditures by Respondent-Parties Attending the Shaw Festival

Expenditure Category	Number of Respondent-Parties	Per Cent
\$ 0— 10.....	80	8.4%
11— 25.....	335	35.3
26— 50.....	301	31.7
51—100.....	150	15.8
101—200.....	56	5.9
201—300.....	10	1.1
301—400.....	3	0.3
401—500.....	7	0.8
501—600.....	2	0.2
601—700.....	—	—
701—800.....	2	0.2
801—900.....	—	—
901—999.....	3	0.3
TOTAL.....	949	100.0%

It must be emphasized that the foregoing expenditure average and total represent only approximate estimates and must be employed with caution.

The values were derived in the following manner. The number of respondent-parties reporting total trip expenditures within the limits of the various categories was recorded and totalled. Total expenditures for each category was then determined by multiplying the number of respondent-parties in each by the average of the expenditure category. For example, the 80 respondent-parties in the expenditure category \$0—\$10 were considered to have spent $\$5 \times 80 = \400 . The dollar values derived in this manner for all expenditure categories were then totalled and an average for all respondent-parties subsequently derived. Obviously, an assumption has been made that when the true average expenditure in each category is small and the number of respondent-parties high, the scale of the possible error is lessened. When the range in the dollar value is high and the number of respondent-parties few, the scale of possible error is increased.

It should be noted that 27 respondent-parties or 2.9 per cent of the total incurred overall trip

expenditures between \$201—\$999. The total expenditure by this group was \$12,163 or 24.4 per cent of that estimated for all respondent-parties. The average was \$450.48 which was 8.6 times that calculated for the entire body of respondents.

It is probable that this small group of respondent-parties with high trip expenditures are representative of special situations. Some may have included the expenditure of a lengthy or costly trip in which a visit to the Shaw Festival was not the primary motivational factor. Much of the expenditure may have been incurred outside the province.

The expenditure category \$ 0—\$200 included 922 respondent-parties or 97.1 per cent of the total. This group spent an estimated \$37,677 with the average being \$40.86. On the basis of an average of 3.36 persons per party the mean expenditure per individual in this group was \$12.16. These averages are probably more realistic in terms of the total volume of normal respondent-parties undertaking a trip with the primary purpose being a visit to the Shaw Festival.

Sixty-seven per cent of the respondent-parties incurred trip expenditures between \$11—\$50. This group accounted for \$17,468 of the estimated total expenditures for all respondent-parties or 35.0 per cent. The average for these 636 respondent-parties was \$27.46. On the basis of 3.36 individuals per party, expenditures averaged \$8.17 per person.

It is probable that the 80 respondent-parties in the expenditure category \$0—\$10 spent an amount close to the upper limit of the range and that some under-reporting of costs was involved in these replies to the question. Only 20 respondents or 2.2 per cent of the sample parties were composed of one person only. Considering that admission tickets are about \$4 each, this group must have spent at least \$5 including transportation. Admission fees for two people are in the \$8 range.

Given the average expenditure per respondent-party of \$52.51 as revealed in the sample and the known volume of 8,000 party admissions, total expenditures associated with trips of all types to the Shaw Festival might be estimated at $8,000 \times \$52.51 = \$420,080$.

On the basis of the previous discussion of expenditure categories the above estimate might be further refined. It has been shown that 97.1 per cent of the respondent-parties spent an average of \$40.86. If these statistics are expanded to the universe of visiting parties, we obtain:

$$\frac{8,000 \times 97.1 \times \$40.86}{100} = \$317,400.$$

It might, therefore, be said that about \$317,400 was spent by respondent-parties whose trips were motivated solely or primarily by attendance at the Shaw Festival. The remaining visitors whose trips were primarily motivated by other factors or involving special expenditure situations spent.

$$\frac{8,000 \times 2.9 \times \$450.48}{100} = \$104,511.$$

Approximations of Total Trip Expenditures

1. Upper Limit (Applying Average Expenditure of \$52.51) = \$420,080
2. For trips essentially motivated by the Shaw Festival $7,768 \times \$40.86 = \$317,400$
3. For trips with special expenditure pattern or not motivated primarily by Shaw Festival $232 \times \$450.48 = \$104,511$

It is extremely difficult to apply a multiplier to the foregoing expenditures to derive an estimate of their total revenue impact on the Province of Ontario. The total derived from an expansion of the higher expenditure categories revealed in the sample probably contains a substantial proportion of costs incurred outside the province. About 25.1 per cent of the visitors came from New York State and 18.0 per cent from the border communities of Buffalo, Lewiston and Niagara Falls. Undoubtedly, some of the expenditures of this group for gasoline, food and beverages were

made in the United States. Many Canadian parties staying overnight or remaining for a few days at Niagara-on-the-Lake or close-by, presumably made expenditures in the United States.

Expenditures in Niagara-on-the-Lake

An analysis of the returns to the questionnaire revealed an average expenditure per respondent-party of \$33.78 made in Niagara-on-the-Lake. Since there was an average of 3.36 persons per party, the average expenditure per individual was \$10.05. Total expenditure by all respondent-parties was \$32,059.

Approximate Total Expenditures Made by Respondent-Parties at Niagara-on-the-Lake

Expenditures	Number of Respondent-Parties	Per Cent
\$ 0— 10.....	77	8.1 %
11— 25.....	475	50.1
26— 50.....	259	27.3
51—100.....	102	10.7
101—200.....	32	3.4
201—300.....	4	0.4
Over \$300.....	—	—
TOTAL.....	949	100.0 %

The average expenditure per respondent-party for the sample was calculated in the same manner as indicated in the discussion of total trip expenditures. It will be noted, however, that in this case there is no substantial group of high expenditures previously encountered. Four respondent-parties spending between \$201—\$300 accounted for a total of \$1,002 which was only about 3.1 per cent of the total of \$32,059.

From the above table it can be seen that 734 or 77.4 per cent of respondent-parties spent between \$11—\$50 in Niagara-on-the-Lake. This group accounted for an outlay of \$18,155 or 56.6 per cent of the total expenditures made by all respondent-parties. The average expenditure per respondent-party in this case was \$24.73 and \$7.36 per individual member.

Those respondent-parties who spent between \$51 and \$300 represented 14.5 per cent of the group of parties. They spent \$13,519 or 42.2 per cent of the total for all respondent-parties. The average expenditure per respondent-party was \$97.96 and \$29.15 per individual member. This group obviously exerts a substantial upward thrust upon the overall average for the sample.

Seventy-seven respondent-parties, or 8.1 per cent of the total, reported respondent-party expenditures of \$10 or less. The total outlay of this group in Niagara-on-the-Lake was only \$385 which was 1.2 per cent of the total. As noted in the discussion of total trip expenditures, expenditures in this category must have been close to the upper dollar range. Many were probably single-person parties with the individual perhaps living in or close to Niagara-on-the-Lake. Some under-reporting of expenditures is also possible.

There were 8,000 parties attending the Shaw Festival in 1968. If the average expenditure per party is applied to this total, the direct cash outlay in Niagara-on-the-Lake associated with visits to the Festival was $8,000 \times \$33.78 = \$270,240$.

It is extremely difficult and indeed an impossible task to apply a multiplier to this total to derive a reasonably precise estimate of the total economic impact upon the community. There is

insufficient knowledge of the nature of the local economy to determine a linking factor that could be subtracted from the total to obtain a residual value to which a multiplier could be applied.

On the basis of information provided by respondent-parties, it was possible to ascertain the division of expenditures between various commodities and services.

Expenditures on Commodities

Table XI shows respondent-party expenditures on various services and commodities. Again, it must be emphasized that these data are only approximations of the actual expenditures. Questionnaire reporting of expenditures involves problems of recall and probable inaccurate detailing of the actual expenditures made. For example, the average party expenditure made on Theatre tickets alone was \$14.09. When the average is expanded by 8,000 parties, it is estimated that respondent-parties spent an approximate \$112,720 on tickets to the Shaw Festival Theatre; actual receipts however, totalled \$94,807 in 1968. This discrepancy can be accounted for by the combination of two factors; over-reporting of expenditures by respondent-parties and the consideration of ticket discounts given to students and special groups by the Shaw Festival Theatre.

VISITOR ATTITUDES

Primary Reasons for Visit to Niagara-on-the-Lake

Attendance at the three events of the Shaw Festival (namely the Theatre, films and seminar) was stated to be the main purpose of respondent-parties for visiting Niagara-on-the-Lake. The Shaw Festival production motivated 89.9 per cent of the visits while the Film Festival instigated 2.0 per cent and the Shaw Seminar 5.5 per cent.

Primary Reasons for Visit to Niagara-on-the-Lake

Reason	Number of Respondent-Parties	Per Cent
Shaw Festival Production.....	853	89.9%
Shaw Seminar.....	52	5.5
Shaw Film Festival.....	19	2.0
Sub-Total.....	924	97.4%
Business.....	2	0.2
Personal Affairs.....	5	0.5
Just Vacationing.....	6	0.7
Passing Through.....	—	—
Shopping.....	1	0.1
Visiting Friends.....	4	0.4
Picnicking.....	3	0.3
Did Not State.....	4	0.4
TOTAL.....	949	100.0%

The pattern revealed above is to be expected since the sample was directed specifically to those persons who had purchased tickets. Seats for most performances had to be obtained in advance thereby preventing persons making on the spur of the moment decisions from attending the Theatre, and visiting its environs.

Secondary Reasons for Visit to Niagara-on-the-Lake

A total of 52.6 per cent of respondent party-heads did not give any secondary reasons motivating their visit to Niagara-on-the-Lake. Another 18.1 per cent stated there was a secondary reason but did not specify.

Secondary Reasons for Visit to Niagara-on-the-Lake

Reason	Number of Respondent-Parties	Per Cent
Shaw Festival Production.....	35	3.7%
Shaw Seminar.....	4	0.4
Shaw Film Festival.....	6	0.6
Sub-Total.....	45	4.7%
Business.....	1	0.1
Personal Affairs.....	7	0.7
Just Vacationing.....	72	7.6
Passing Through.....	7	0.7
Shopping.....	32	3.4
Visiting Friends.....	30	3.2
Picnicking.....	84	8.9
Other Reasons.....	172	18.1
Did Not State.....	499	52.6
TOTAL.....	949	100.0%

The major point to be noted in this instance is that the vast majority of respondents were visiting Niagara-on-the-Lake at that time essentially because of the Shaw Festival. The visit was not a matter of combining attendance at the Festival with some other activity or interest in the area during the afternoon or evening in question.

Reasons for Planned Repeat Visit to Niagara-on-the-Lake

Attendance at the events of the Shaw Festival constituted about 55.6 per cent of all reasons given for a planned repeat visit to Niagara-on-the-Lake. This special event was, therefore, a satisfying experience with a sustaining attraction quality for a high proportion of the respondent-parties.

Reasons Given for Repeat Visits to
Niagara-on-the-Lake by Respondent-Parties

Reasons	Number of Respondent-Parties	Per Cent
Festival Theatre.....	897	55.6%
Business.....	13	0.8
Personal.....	60	3.7
Vacation.....	54	3.3
Recreation.....	116	7.2
Pleasure.....	271	16.8
Shopping.....	56	3.5
Simcoe Ball.....	6	0.4
House Tour.....	140	8.7
TOTAL.....	1,613*	100.0%

Note: *More than one reason for trip was given by some of the 949 respondent-parties.

General pleasure and recreation were stated as reasons for repeat visitation in 24.0 per cent of all motivational factors listed. The attractive nature of the physical and cultural attributes of the general area is undeniably influential.

Personal matters, which would induce a repeat visit, were probably related to a considerable extent to connections with friends and relatives who are residents of the Town. This category accounted for 3.7 per cent of all reasons presented.

The historic architecture of Niagara-on-the-Lake apparently exerted a reasonably strong attraction upon those visiting the Shaw Festival. About 8.7 per cent of the reasons given for a repeat visit were related to a desire to tour the houses of the Town. The historicity of the Town and the Niagara Frontier as a whole apparently represents a substantial tourist development potential that deserves systematic, co-ordinated and comprehensive exploration.

How Niagara-on-the-Lake was First Brought to the Attention of Respondents

Interestingly, 54.9 per cent of the respondent party-heads indicated that the town of Niagara-on-the-Lake was first brought to their attention through the Shaw Festival Theatre. It is, therefore, obvious that the introduction of this special event has done much to increase the public awareness of the community.

How Niagara-on-the-Lake was First Brought to the Attention of Respondent-Parties

	Number of Respondent-Parties	Per Cent
Shaw Festival Theatre	521	54.9%
Word-of-mouth	83	8.7
Family or friends	132	13.9
Business contacts	12	1.3
Advertising	20	2.1
News media	34	3.6
T.V. or radio	1	0.1
Did Not State	146	15.4
TOTAL	949	100.0%

Another 13.9 per cent were made aware of Niagara-on-the-Lake through friends and relatives. Some of this group probably have personal connections with residents of the community and undertake periodic visits to them.

Word-of-mouth apparently brought Niagara-on-the-Lake to the attention of 8.7 per cent of the respondents. Business contacts were noted by another 1.3 per cent.

The low incidence of advertising through brochures, news media, television or radio is noticeable. This same pattern was evidenced in the Gas Station Survey (i) conducted by the Department in 1967. In the same study, however, it was found that more than 50 per cent of the respondents were generally aware of Ontario advertising.(ii).

It appears that it is difficult to effectively measure the significance of advertising in relation to a specific event. If those questioned had been asked whether or not they were aware of advertising promoting the Shaw Festival, or any other event, a more reliable picture of the impact could be obtained.

Order of Preference of Interest in Festival Events

Respondents were asked to rate, in their order of preference of interest, the range of Shaw Festival activities including stage productions, seminars and films.

Respondent-Parties' Preference of Interest in Shaw Festival Theatre Activities in Per Cent

Preference	Stage Productions	Film Festival	Seminars
First	98.8%	0.5%	1.4%
Second	0.2	71.7	27.9
Third	1.0	27.8	70.7
TOTAL	100.0%	100.0%	100.0%

An analysis of the results clearly indicates that the entertainment aspect provides the broad appeal. Moreover, the stage productions occupy the indispensable pivotal position.

(i) *Gas Station Survey*, 1967, Travel Research Branch, Ontario Department of Tourism and Information, Table XI.

(ii) *Ibid*, Table XII.

Stage productions were the prime interest or preference of 98.8 per cent of those replying. Film presentations were rated as the second choice of 71.7 per cent of the respondents and the seminars third, with 70.7 per cent.

Preference for Commencement of Theatre Performance

The evening performance at the Shaw Festival Theatre commenced at 7:30 p.m. on the opening night of each new play and 8:30 for all other nights from Tuesday to Saturday. Matinees on Saturday and Sunday commenced at 5:00 p.m.

The analysis of the results of the question relating to the starting time for evening performances revealed that about 53 per cent of the respondents preferred a starting time prior to 8:30 p.m. Fifteen per cent felt that commencement of plays as early as 7:30 was desirable while 46.7 per cent preferred 8:30 p.m.

Preference of Respondent-Parties for Commencement of Evening Performances (i)

Starting Time	Per Cent of Respondent-Parties
7:30 p.m.....	15.1 %
8:00 p.m.....	38.2
8:30 p.m.....	46.7
TOTAL.....	100.0 %

(i) 824 of 949 respondents or 86.8 per cent answered this question.

Of those replying to this question, 47 per cent indicated that they would prefer a 2:00 p.m. commencement time for both Saturday and Sunday matinee performances.

Preference of Respondent-Parties for Commencement of Matinee Performances (ii)

Starting Time	Per Cent of Respondent-Parties
2:00 p.m.....	47.2 %
5:00 p.m.....	52.8
TOTAL.....	100.0 %

(ii) 615 of 949 respondents or 64.8 per cent answered this question.

No attempt is made in this report to comment upon the advisability of shifting the starting time for performances which involves the consideration of a wide variety of factors outside the scope of this study. But irrespective of this, the percentage of respondents preferring an earlier commencement of both evening and matinee presentations is worthy of note.

TABLE I

Time away from home on trip to Shaw Festival, Niagara-on-the-Lake

Number of Days Away From Home	Number of Respondent-Parties	Per Cent	
Half Day.....	578	60.91 %	} 81.77 %
1 Day.....	198	20.86	
2-3 Days.....	113	11.91	
4-7 Days.....	28	2.95	
8-14 Days.....	12	1.26	
15-21 Days.....	6	0.63	
22-30 Days.....	3	0.32	
More than 30 Days.....	3	0.32	
Did Not State.....	8	0.84	
	949	100.00 %	

Average Time Away From Home: 1.4 Days per Respondent-Party

TABLE II

Time spent at Niagara-on-the-Lake

Length of Time Spent at Niagara-on-the-Lake	Number of Respondent-Parties	Per Cent	
Less than 3 hours.....	191	20.13 %	} 84.73 %
3 hours to 1 day (Not overnight).....	613	64.60	
1 night.....	99	10.43	} 14.74 %
2-4 nights.....	35	3.68	
5-10 nights.....	4	0.42	
More than 10 nights.....	2	0.21	
Did Not State.....	5	0.53	
	949	100.00 %	

Average Time Spent at Niagara-on-the-Lake per Respondent-Party 0.63 Days

TABLE III

**Selected Communities, visited or passed through, on trip to Niagara-on-the-Lake
by Respondent-Parties**

Community	Community Visited		Community Passed Through	
	Number of Respondent-Parties	Per Cent	Number of Respondent-Parties	Per Cent
Niagara Falls, Ontario.....	180	18.97 %	128	13.49 %
Niagara Falls, New York.....	38	4.00	111	11.69
Windsor.....	7	0.74	7	0.74
Barrie & North of Barrie.....	5	0.53	3	0.32
Peterborough.....	5	0.53	4	0.42
Toronto.....	51	5.37	31	3.27
Stratford.....	27	2.85	1	0.11
Montreal.....	19	2.00	28	2.95
St. Catharines.....	80	8.43	121	12.75
Rochester.....	24	2.53	55	5.79
Hamilton.....	32	3.37	84	8.85
Buffalo.....	9	0.95	5	0.53
Sub-Total.....	477	50.27 %	578	60.91 %
Did Not Visit or Pass Through Any of Above Communities.....	472	49.73	371	39.09
Total Number of Respondent- Parties.....	949	100.00 %	949	100.00 %

TABLE IV

Respondent-Parties' reasons for not staying in the vicinity of Niagara-on-the-Lake

Reasons	Number of Respondent-Parties	Per Cent
Lack of Campsites and Trailer Facilities.....	4	0.42 %
Lack of "Things to do".....	25	2.63
Lack of Motel/Hotel Accommodation.....	63	6.65
Returning Home the Same Night.....	679	71.55
Had not Thought of Niagara-on-the-Lake as a "Place to Stay".....	25	2.63
Other Reasons.....	65	6.85
Did Not State.....	88	9.27
	949	100.00 %

TABLE V

Points of interest visited by Respondent-Parties on trip to Niagara-on-the-Lake

Points of Interest	Number of Respondent-Parties	Per Cent
Niagara Falls.....	267	67.94 %
Lake Erie.....	—	—
Fort George.....	6	1.53
Fort Mississauga.....	—	—
Historical homes and buildings.....	56	14.25
Butler's Burial Ground.....	—	—
Queenston Heights.....	3	0.76
Museums.....	—	—
Local Churches.....	61	15.52
Sub-Total.....	393	100.00 %
Did Not State Any of Above Points of Interest Visited.....	556	58.59 %
Total Parties.....	949	100.00 %

TABLE VI

Frequency of visits to the Theatre, to the Town, and to the Area, made by Respondent-Parties

Number of Visits	SHAW FESTIVAL THEATRE		TOWN OF NIAGARA-ON-THE-LAKE		AREA	
	Number of Respondent-Parties	Per Cent	Number of Respondent-Parties	Per Cent	Number of Respondent-Parties	Per Cent
Once.....	270	30.79 %	97	13.18 %	42	6.56 %
Twice.....	177	20.18	104	14.13	68	10.63
3 Times.....	136	15.51	108	14.67	51	7.97
4 Times.....	90	10.26	68	9.24	37	5.78
5 Times.....	40	4.56	37	5.03	37	5.78
6 Times.....	43	4.90	53	7.20	36	5.63
7 Times.....	17	1.94	21	2.85	13	2.03
8 Times.....	19	2.17	14	1.90	9	1.41
9 or More Times.....	85	9.69	234	31.80	347	54.21
	877	100.00 %	736	100.00 %	640	100.00 %
Average Number of Visits per Respondent-Party.....	3.48		5.76		7.60	

TABLE VII

Facilities used by Respondent-Parties while at Niagara-on-the-Lake

Facilities	Number of Respondent-Parties	Per Cent	
1. Shaw Festival Theatre.....	949	100.00 %	
TOTAL.....	949	100.00 %	
2. Hotel Room.....	90	23.20 %	} 34.54 %
Motel Room.....	44	11.34	
Friend's Home.....	27	6.96	
Trailer Camp.....	4	1.03	
Parks.....	103	26.55	
Picnic Areas.....	120	30.92	
TOTAL.....	388	100.00 %	
3. Service Stations.....	157	18.98 %	
Brewers Retail Stores.....	9	1.10	
Public Beverage Rooms.....	68	8.22	
Liquor Stores.....	24	2.90	
Restaurants or Dining Rooms.....	569	68.80	
TOTAL.....	827	100.00 %	
4. Marina.....	14	34.15 %	
Golf Course.....	19	46.34	
Movie Theatre.....	8	19.51	
TOTAL.....	41	100.00 %	
5. Hospital.....	1	0.95 %	
Doctor or Dentist.....	7	6.67	
Drug Store.....	97	92.38	
TOTAL.....	105	100.00 %	
6. Grocery Store.....	85	28.72 %	
Hardware Store.....	12	4.05	
Clothing Store.....	30	10.14	
Other Stores.....	169	57.09	
TOTAL.....	296	100.00 %	
7. Swimming Pool.....	5	100.00 %	
TOTAL.....	5	100.00 %	
8. Other Facilities.....	77		
TOTAL—ALL FACILITIES.....	2,688		
Average Number of Facilities Used per Respondent-Party.....	2.83		

TABLE VIII

Facilities used by Respondent-Parties while at Niagara-on-the-Lake and en route

Facilities	Number of Respondent-Parties	Per Cent
1. Shaw Festival Theatre.....	949	100.00 %
TOTAL.....	949	100.00 %
2. Hotel Room.....	102	20.44 %
Motel Room.....	79	15.83
Friend's Home.....	54	10.82
Trailer Camp.....	12	2.40
Parks.....	132	26.45
Picnic Areas.....	120	24.06
TOTAL.....	499	100.00 %
3. Service Stations.....	246	24.33 %
Brewers Retail Store.....	18	1.78
Public Beverage Rooms.....	75	7.42
Liquor Stores.....	39	3.86
Restaurants or Dining Rooms.....	633	62.61
TOTAL.....	1,011	100.00 %
4. Marina.....	14	30.43 %
Golf Course.....	22	47.83
Movie Theatre.....	10	21.74
TOTAL.....	46	100.00 %
5. Hospital.....	1	0.80 %
Doctor or Dentist.....	9	7.14
Drug Store.....	116	92.06
TOTAL.....	126	100.00 %
6. Grocery Store.....	102	28.90 %
Hardware Store.....	17	4.82
Clothing Store.....	47	13.31
Other Stores.....	187	52.97
TOTAL.....	353	100.00 %
7. Swimming Pool.....	16	100.00 %
TOTAL.....	16	100.00 %
8. Other Facilities.....	77	
TOTAL—ALL FACILITIES.....	3,077	

TABLE IX

Recreational activities undertaken by Respondent-Parties at Niagara-on-the-Lake

Type of Recreational Activity	Number of Respondent-Parties
Picnicking.....	145
Golfing.....	14
Attending Festival Theatre.....	949
Attending Movie.....	9
Boating.....	13
Swimming.....	16
Playing Tennis.....	1
Other.....	95
TOTAL.....	1,242
Average Number of Recreational Activities Undertaken per Respondent-Party.....	1.31

TABLE X

Respondent-Parties' rating of various facilities and services at Niagara-on-the-Lake

Facilities and Services Used	EXCELLENT		GOOD		FAIR		POOR		TOTAL RESPONDENT-PARTIES	
	Number of Respondent-Parties	Per Cent	Number of Respondent-Parties	Per Cent	Number of Respondent-Parties	Per Cent	Number of Respondent-Parties	Per Cent	Number	Per Cent
Hotel/Motel Accommodation.....	55	28.21 %	53	27.18 %	40	20.51 %	47	24.10 %	195	100 %
Quality of Restaurant Food.....	159	31.61	197	39.17	117	23.26	30	5.96	503	100 %
Quality of Restaurant Service.....	141	30.85	187	40.92	92	20.13	37	8.10	457	100 %
Quality of Dining Rooms.....	209	46.24	166	36.72	55	12.17	22	4.87	452	100 %
Service Stations.....	42	25.77	100	61.35	16	9.81	5	3.07	163	100 %
Entertainment Facilities.....	146	46.95	86	27.65	59	18.97	20	6.43	311	100 %
Recreational Facilities.....	51	41.46	47	38.21	21	17.07	4	3.26	123	100 %
Taverns.....	22	27.85	26	32.91	20	25.32	11	13.92	79	100 %
Cocktail Lounges.....	57	43.85	43	33.08	24	18.46	6	4.61	130	100 %
Attitude of Local People Toward Visitors	171	41.81	204	49.88	26	6.36	8	1.95	409	100 %
Local Prices of Goods and Services....	49	15.55	202	64.13	59	18.73	5	1.59	315	100 %
Camping Facilities.....	6	19.35	16	51.62	6	19.35	3	9.68	31	100 %
Children's Facilities.....	6	20.69	11	37.93	9	31.03	3	10.35	29	100 %
Closing Hours.....	3	3.70	27	33.33	21	25.93	30	37.04	81	100 %
Shops/Stores.....	39	17.81	129	58.90	44	20.09	7	3.20	219	100 %

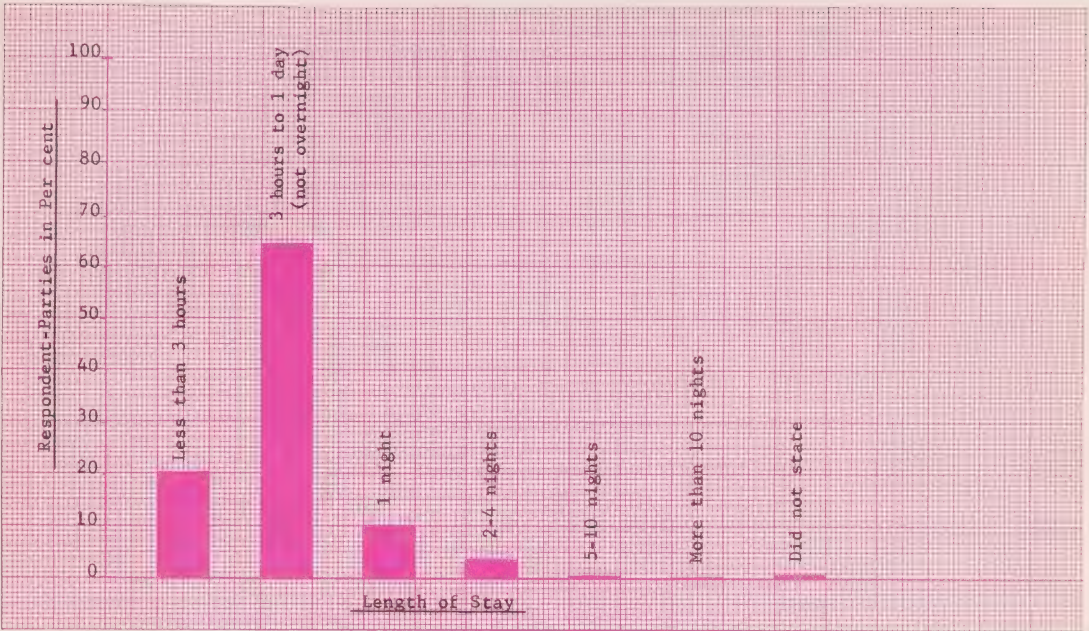
TABLE XI

Approximate expenditures made by Respondent-Parties for services and commodities in Niagara-on-the-Lake

Expenditure	Food & Beverage		Gift Merchandise		Festival Tickets		Accommodation		Entertainment		Attractions		Personal Use Merchandise		Shaw Seminar	
	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent
		%		%		%		%		%		%		%		%
\$ 0	389	40.99	859	90.52	—	—	841	88.63	920	96.94	932	98.21	832	87.67	929	97.89
1- 5	140	14.75	51	5.37	31	3.27	2	0.21	11	1.16	13	1.36	69	7.27	—	—
6-10	37	3.90	15	1.58	338	35.62	11	1.16	10	1.05	3	0.32	20	2.11	2	0.21
11-15	104	10.96	8	0.84	146	15.38	14	1.48	3	0.32	1	0.11	8	0.84	2	0.21
16-20	67	7.06	7	0.74	185	19.49	32	3.37	4	0.42	—	—	8	0.84	4	0.42
21-25	68	7.17	4	0.42	41	4.32	6	0.63	—	—	—	—	4	0.42	—	—
26-30	31	3.27	3	0.32	37	3.90	11	1.16	—	—	—	—	1	0.11	2	0.21
31-40	57	6.01	2	0.21	22	2.32	12	1.26	—	—	—	—	—	—	4	0.42
41-50	35	3.69	—	—	7	0.74	8	0.84	1	0.11	—	—	1	0.11	3	0.32
Over \$50	21	2.20	—	—	7	0.74	12	1.26	—	—	—	—	6	0.63	3	0.32
Did Not State	—	—	—	—	135	14.22	—	—	—	—	—	—	—	—	—	—
	949	100%	949	100%	949	100%	949	100%	949	100%	949	100%	949	100%	949	100%
Average Party Expenditure for Services and Commodities	\$10.95		\$0.76		\$14.09		\$2.89		\$0.28		\$0.07		\$1.13		\$0.64	Total \$30.81
Per Cent of Average Total Party	35.54%		2.47%		45.73%		9.38%		0.91%		0.23%		3.67%		2.07%	100.00%

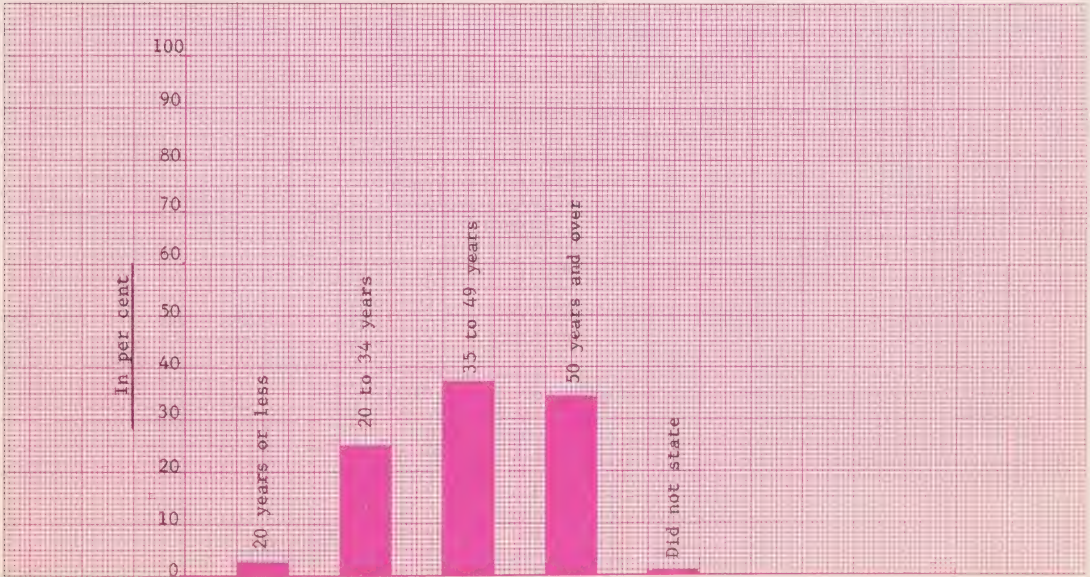
Graph No. 1

Time Spent at Niagara-on-the-Lake

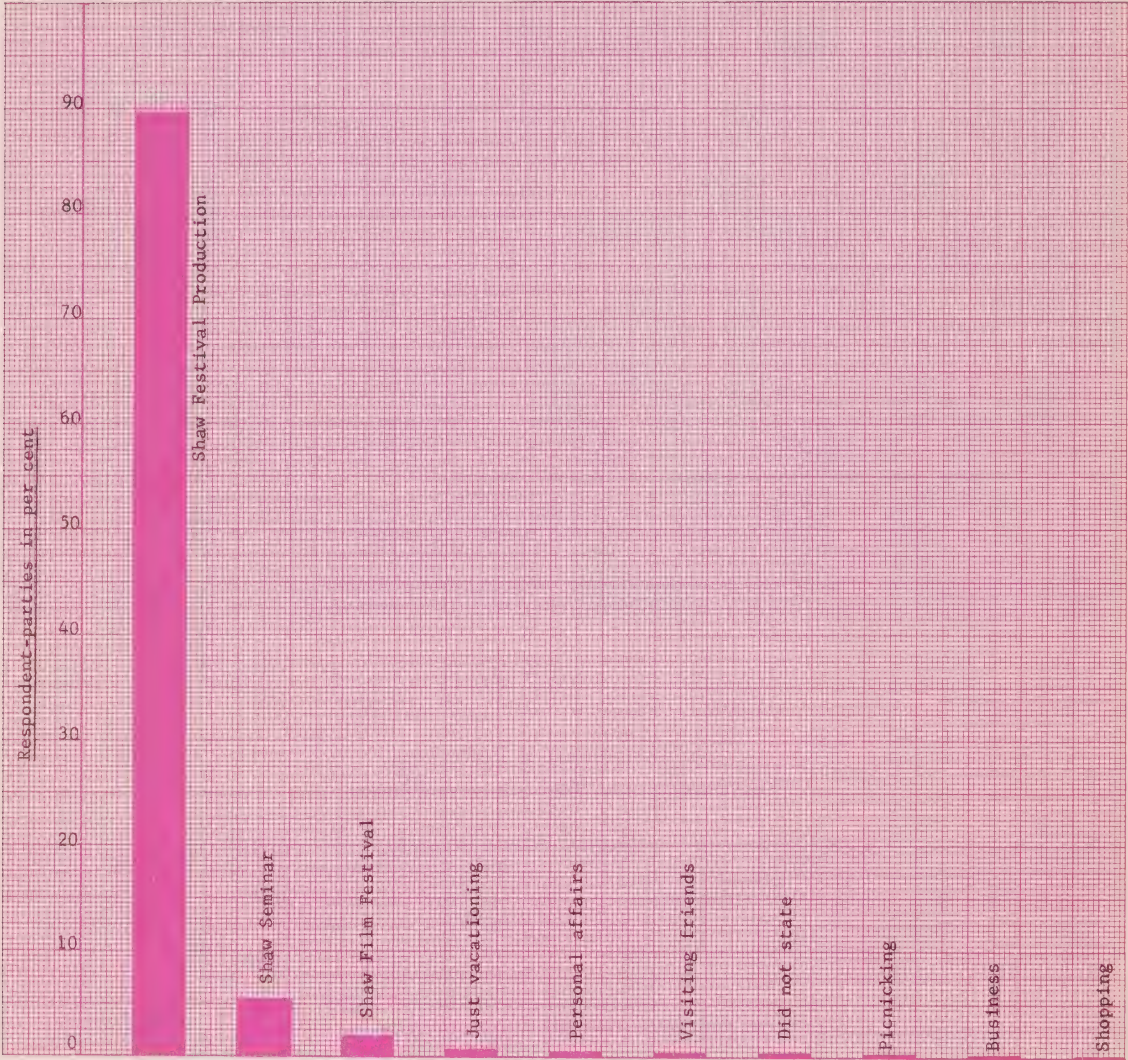


Graph No. 2

Age of Respondent Party-Heads
Attending the Shaw Festival Theatre

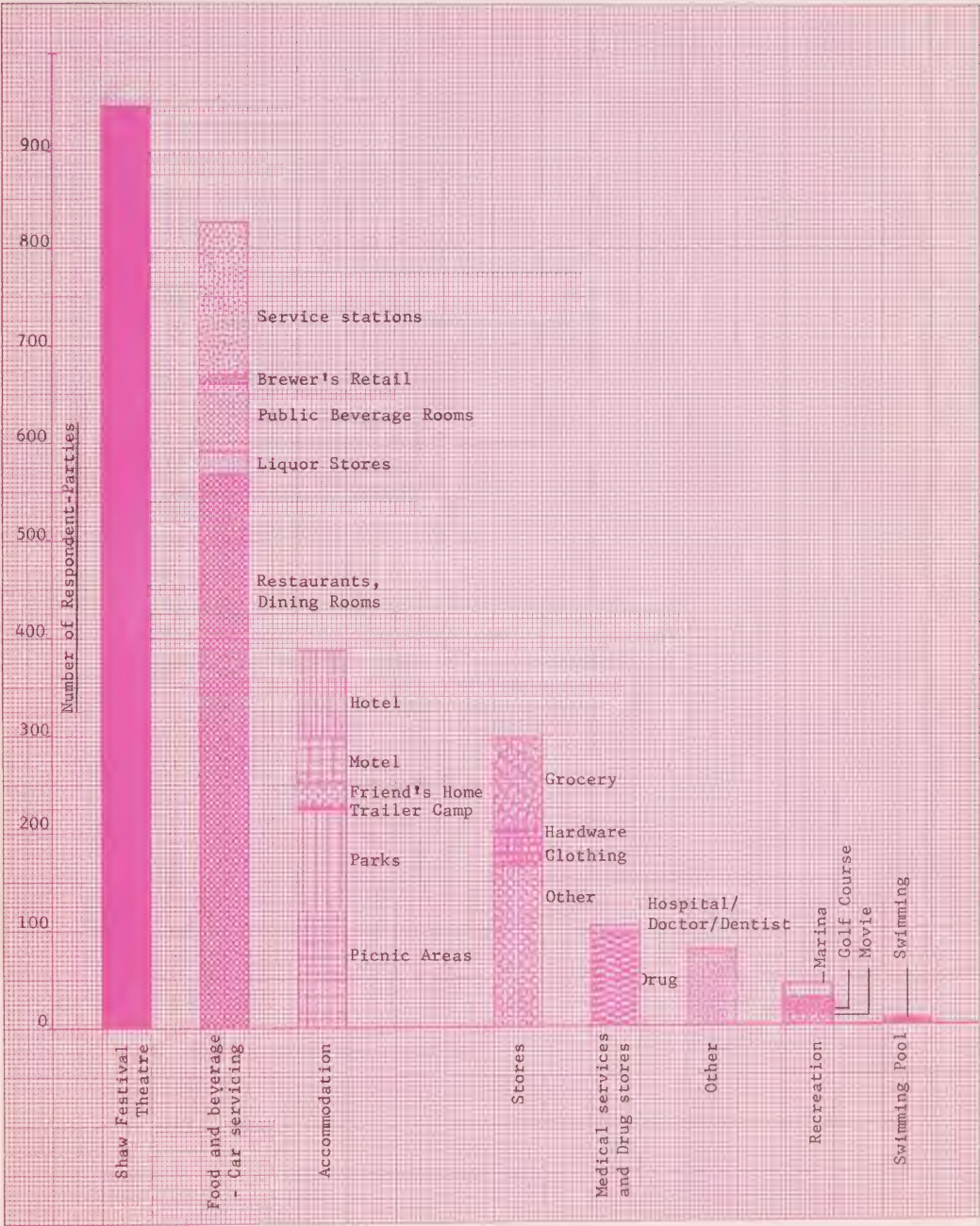


Primary Reason for
Visit to Niagara-on-the Lake



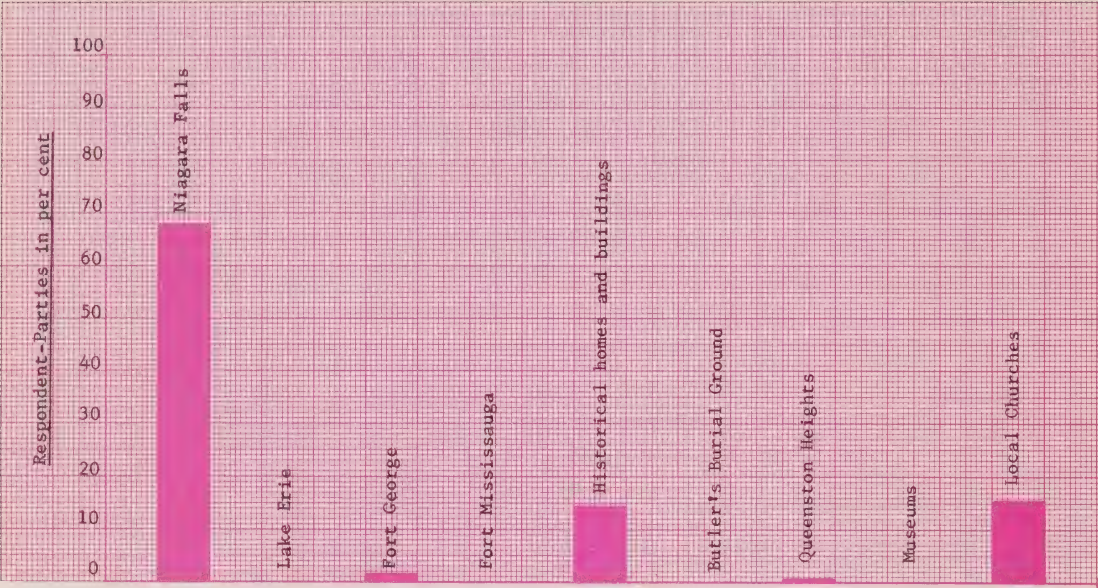
Graph No. 4

Facilities Used by Respondent-Parties
While at Niagara-on-the Lake



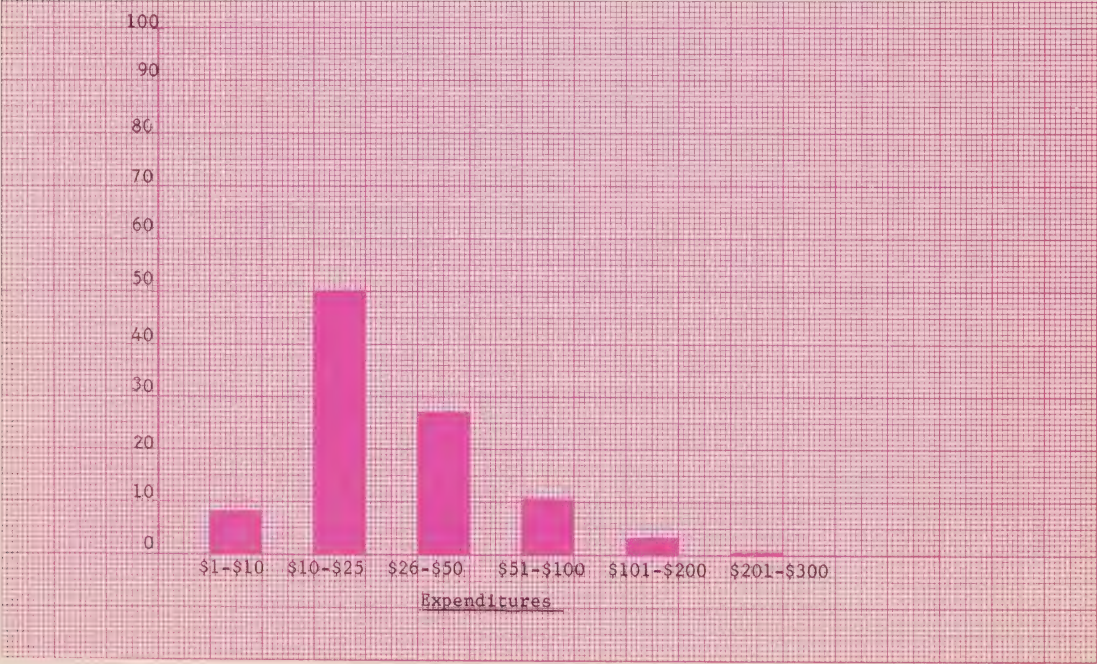
Graph No. 5

Points of Interest Visited by Respondent-Parties
On Trip to Niagara-on-the-Lake



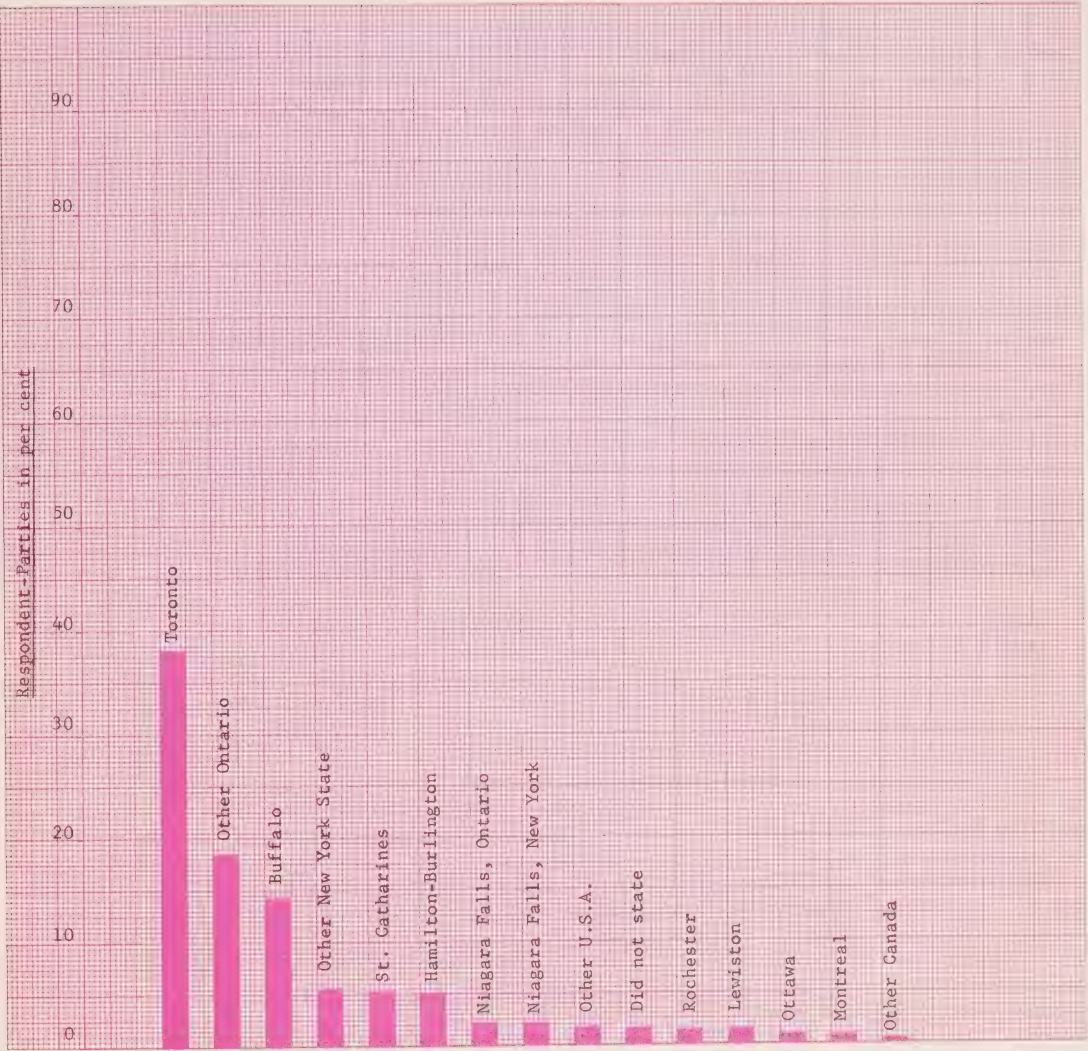
Graph No. 6

Approximate Total Expenditures Made by Respondent-Parties
At Niagara-on-the-Lake

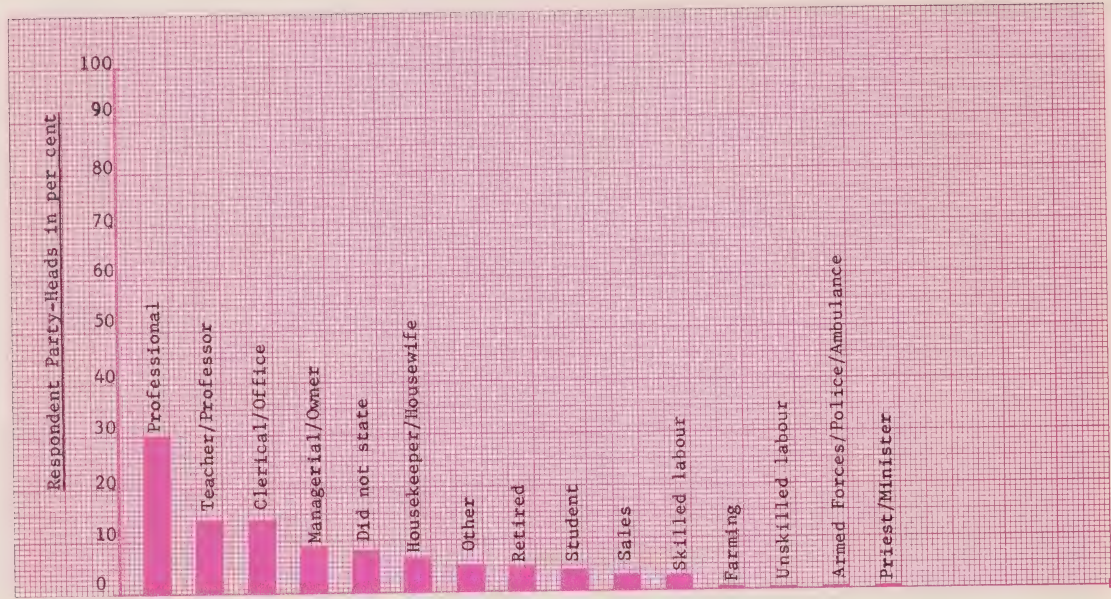


Graph No. 7

Home Town of Respondent Party-Head



Occupation of Respondent Party-Head



APPENDIX I

Sampling Procedure

A stratified random sampling procedure in a universe of parties ordering tickets from the Shaw Festival Theatre was employed. This study was, therefore, concerned only with those visitors to Niagara-on-the-Lake who purchased tickets and attended performances at the Shaw Festival Theatre, the Film Festival, or the Seminar on George Bernard Shaw.

All tickets had to be ordered in advance. The Administration's mailing list of approximately 8,000 parties garnered during the 1968 Festival period (June 27th to September 1st) was stratified according to origin and a proportional allocation for each origin was then determined to obtain a sample size of 2,000.

Two thousand questionnaires were mailed out and 949 usable completed replies were returned. This unusually high incidence of returns is comparable with those received during the Stratford Visitor Study where out of 5,000 mailed questionnaires, 2,478 usable replies were received.

The completed questionnaires were punched and tabulated, and from data obtained, the analysis, Tables and Graphs were prepared.

Technically the sampling was carried out in five stages:

Stage I —Determine total number of parties= R

Stage II —Stratify Stage I according to origins as follows:

Metro Toronto= N_1

Other Ontario = N_2

Other Canada = N_3

American = N_4

Where $N_1 + N_2 + N_3 + N_4 = R$

Stage III—(i) Taking each origin in Stage II separately and stratify according to

(a) number of parties attending matinees only = K_1

(b) number of parties attending weekday evenings= K_2

(c) number of parties attending on weekends = K_3

(ii) Determine the proportional allocation for each origin to obtain a sample size of 2,000 as follows:

$$\frac{M_1}{N_1} = \frac{M_2}{N_2} = \frac{M_3}{N_3} = \frac{M_4}{N_4} = \frac{2,000}{R}$$

Where $M_1 + M_2 + M_3 + M_4 = 2,000$

Stage IV—Determine the proportional allocation for stage III (i) for each origin as follows:

$$(a) \quad \frac{X_1}{K_1} = \frac{X_2}{K_2} = \frac{X_3}{K_3} = \frac{M_1}{N_1} \quad (\text{for Metro Toronto})$$

$$(b) \quad \frac{X_1}{K_1} = \frac{X_2}{K_2} = \frac{X_3}{K_3} = \frac{M_2}{N_2} \quad (\text{for other Ontario})$$

$$(c) \quad \frac{X_1}{K_1} = \frac{X_2}{K_2} = \frac{X_3}{K_3} = \frac{M_3}{N_3} \quad (\text{for other Canada})$$

$$(d) \quad \frac{X_1}{K_1} = \frac{X_2}{K_2} = \frac{X_3}{K_3} = \frac{M_4}{N_4} \quad (\text{for American})$$

Where $X_1 + X_2 + X_3 = M$

$$K_1 + K_2 + K_3 = N$$

Stage V —Select final sample of size X_1, X_2, X_3 for each origin.

APPENDIX II

History of the Shaw Festival

Situated on a point of land where the Niagara River empties into Lake Ontario in an area known to the Iroquois three hundred years ago as Onguiaahra, stands a truly old "Canadian" town of great charm—the small but all important historic town of significant cultural relevance in past and present history, the town of Niagara-on-the-Lake. Here is an all "Canadian" town—and there's no town anywhere else in Canada quite like it.

Known by forty different names until incorporated into the Town of Niagara in 1850, it is known today as Niagara-on-the-Lake to avoid confusion with Niagara Falls. In this area, Canada's future as a nation was decided and assured. Here, in this Town of Niagara, the first Parliament of Upper Canada was held in 1792. In this area, names such as Queenston, General Brock, St. David's, McNab, Fort George, Colonel John Butler, La Salle, Fort Mississauga, Homer and Virgil are names that ring a clarion call in the saga of the exciting story of Canadian history. Rather unique in this age of superhighways, the Town of Niagara is small enough to be seen on foot, and every foot of it is a delight to see.

With the founding of the Shaw Festival in 1962 and its incorporation into the laws of the Province of Ontario on July 22nd, 1963, along with the only recent recognition of its enormous potential, the Town of Niagara-on-the-Lake has come to play an even greater role in the laying of Canada's cultural foundations.

An already living theatre that desperately needs a proper place to perform, (unlike other structures which are often built with little to house), the Shaw Festival Theatre is located in the converted old Court House in the Town's square which dates back to the time when Niagara was both the social and administrative capital of Upper Canada housing the courts of the united counties of Haldimand, Lincoln, and Welland.

The initial impetus for the formation of a theatre in Niagara-on-the-Lake came from a noted Niagara attorney—Brian Doherty, Q.C.—a former Broadway playwright and founder of such Canadian companies as the Straw Hat Players and the Red Barn Theatre.

Assisted by a prominent Buffalo educator and Niagara summer resident, Calvin C. Rand, who became President of the Festival in 1964, Doherty conducted meetings of people from the area interested in theatre, raised a few hundred dollars, and organized a company of the best amateurs from the area. In the summer of 1962, the Shaw Festival was comprised of four performances each of "Don Juan in Hell" and "Candida" presented in the Town Hall. In the following year, the amateur group was reorganized as a professional company and incorporated into the Court House Theatre Company.

Most significant, however, is the fact that the Court House Theatre has earned the unique distinction of being the only professional theatre in existence devoted to the works of its central playwright—George Bernard Shaw—and his contemporaries. The Festival, partly by chance, partly through the perception of its organizers, has coincided with a tremendous revival of enthusiasm for George Bernard Shaw throughout the English-Speaking World. Thus, as Stratford appropriated William Shakespeare, Niagara-on-the-Lake adopted George Bernard Shaw, not only because he was the only other English playwright to write over forty full-length plays, but because his wit and wisdom are even more timely and refreshing today than when written.

As J. B. Priestly wrote on Shaw, one can well understand his significance today;

"The Victorian Age was filled with giants and junk. The last Victorian giant was a red-bearded Irishman who put a match to the junk and then sauntered away, chuckling, fully aware of the Mephistophilian effect of the leaping flames."

Because the initial policy of presenting three major Shaw plays each summer would soon prove repetitious, the new Artistic Director, Paxton Whitehead decided, in 1967, to present one of the best examples of playwriting in the period of Shaw's involvement in the theatre. The Festival is continuing to build towards a three-play formula per season consisting of one major Shaw, one more esoteric Shaw and one major non-Shavian play.

There are numerous Shakespearean festivals throughout the world but, to date, there is only one Shaw Festival and luckily, Ontario provides both to taste. The Shaw Festival complements rather than competes with the older, bigger and more celebrated Shakespearean Festival at nearby Stratford. To the tourist and resident, the Ontario summer proves to be an intellectual treat as he swings with ease from the grandeur and poetry of Shakespeare at Stratford to the spare, compelling wit and philosophy of the more topical Shaw at Niagara-on-the-Lake.

In addition to a theatre programme, the run of which extends from the end of June to the beginning of September, a "Shaw Seminar" and a "Shaw Winter Film Festival" were initiated in 1964 and a "Shaw Summer Film Festival" was initiated in 1967.

Co-sponsored by Brock University with the founder and first president of the Shaw Festival, Brian Doherty, Q.C., as its Chairman, the four-day Shaw Seminar calls upon leading authorities from the artistic and academic world to lecture in various locations such as the Court House Theatre, Brock University (St. Catharines), Queenston Heights Restaurant and St. Mark's Parish Hall.

Besides luncheons, motor tours of historic houses and sites, and visits to the Niagara museum, members attend films and two Festival productions. Registration, however, is limited to one hundred persons. A set fee includes all theatre tickets, and meals and lectures therein. It does not include accommodation and other meals, the responsibility of which is placed upon the applicants who are strongly advised to book ahead for reservations as it is the height of the tourist season. Motels and hotels under broad cost-categories ranging from deluxe to moderate are listed in the Seminar pamphlet.

After five years of steady progress, the Shaw Festival has become a vital part of the area's cultural life, entrenching itself firmly and smoothly in the ever-spreading complex of Toronto culture. Audience response has grown rapidly each summer. Since 1963, annual box office revenues have increased from \$9,069.85 to \$94,807.93 in 1968.

Government support at all levels, as well as annual fund raising, has matched this growth. In 1965, the Province of Ontario Council for the Arts granted the Shaw Festival \$10,000; the following year, the Canada Council contributed \$2,400. Other contributors were the County of Lincoln, and the Town of Niagara. In 1969, the grant from the Canada Council was \$35,000, and from the Province of Ontario, \$18,000.

In spite of the greatly increased number of performances and its greatly extended season to a ten week run from its original three, the Festival's high professional standards of direction, performance and production have been maintained. Its international renown based on the enthusiasm of ever-increasing audiences has retained an audience attendance, the highest in the North American continent, which averages around 97 per cent of its total seating capacity of approximately 385 persons.

This record has been achieved despite the deficiencies of the old Court House Theatre which, though it can only be rented during the summer months, also houses the annual fête of the Simcoe Ball. In fact, one of the reasons why the Festival attracts and maintains its high audience attendance is that it is located within easy driving distance of residents of Toronto and other major cities in Southern Ontario and the citizens of Buffalo, Detroit, Rochester and other U.S. cities. Moreover, the Court House Theatre Company is the sole professional theatrical company operat-

ing on the Canadian-United States border receiving regular financial support from the citizens of both countries. Indeed, every performance thus becomes a minor international occasion.

The growing reputation the Festival is achieving in both Canada and the States will grow even brighter in the years ahead if the theatre continues as energetically and enthusiastically as it has in the past.

Although, as a producing company, the Festival plans to expand with tours and special engagements, a step begun in collaboration with the Manitoba Theatre Centre which led to the engagement of "Major Barbara" at Expo '67 and in Winnipeg, the season at Niagara-on-the-Lake is expected to confine itself to the summer months.

Though the Court House has served well and was a fortunate and appropriate place to begin, it has its artistic and economic limitations, to say nothing of such matters as comfort and security. Present facilities lack completely in storage space and workshop space, and prohibit an alternating repertoire, forcing each production to run consecutively.

A new theatre has become a necessity; audience demand is sufficient reason.

Plans to build a new theatre are underway; future prospects for expansion are encouraging—but when it will all come to pass is still a matter of conjecture. The Shaw Festival currently is in the process of trying to raise \$2 million for the project.

In the meantime another non-profit cultural organization, the Toronto Symphony Orchestra, has been looking for a summer home bandshell in the Niagara Frontier region. In the spring of this year, the Federal Government announced the transfer of three provincially-owned historic sites—Fort George, Navy Hall, and Queenston Heights—to Federal administration. Recognizing that the Shaw Festival and the Toronto Symphony add to the charms of this area, the Federal Government has provided leasing arrangements to the two cultural non-profit enterprises to establish proper accommodation in the neighbourhood of Niagara-on-the-Lake. The Shaw Festival is presently making plans to build its new theatre on the golf course west of Fort Mississauga.

With the announcement of the transfer of sites in Niagara-on-the-Lake to the Federal National Historic Sites Service, considerable historic research and substantial expenditures will inevitably be incurred indicating a prosperous economic future and an increasing number of visitors to locations in Niagara-on-the-Lake, including the Shaw Festival and the Toronto Symphony.

Combined with its historical assets, its highly favourable geographic location, and its attractive physical landscape, the entire Niagara Frontier is in an enviable position for tourist development. The comparative lack of commercial development, while discouraging from a commercial standpoint, has preserved the historical atmosphere of the town—a major factor responsible for the success of the Shaw Festival. Visitors to the Shaw Festival gain the opportunity of making excursions to the lakeside parklands where museums and ancient military and naval establishments illustrate Canada's early struggle for independence. Increased summer activity through the Shaw Festival Theatre would seem to indicate historic Niagara as being the logical centre for growth in the tourist trade, but facilities must be established with the utmost discretion in order to preserve the historical atmosphere of the Town.

The Shaw Festival Theatre at Niagara-on-the-Lake has become an institution in our Canadian cultural heritage alongside the Shakespearean Festival at Stratford. The charming aura of the town has enhanced its establishment and its success—and that success must now be ensured.

APPENDIX III

NIAGARA-ON-THE-LAKE TOURIST SURVEY

1. On this trip, how long were you away from Home?
- | | |
|--------------------------------------|---|
| 1. 1/2 day <input type="checkbox"/> | 5. 8 days-2 weeks <input type="checkbox"/> |
| 2. 1 day <input type="checkbox"/> | 6. 15 days-3 weeks <input type="checkbox"/> |
| 3. 2-3 days <input type="checkbox"/> | 7. 22 days-1 month <input type="checkbox"/> |
| 4. 4-7 days <input type="checkbox"/> | 8. More than 1 month <input type="checkbox"/> |
2. What was the total number of persons in your party when you visited Niagara-on-the-Lake during the time period checked above?

(PLEASE CHECK ONE BOX (X))

- | | |
|---|--|
| 1. One person <input type="checkbox"/> | 4. Four persons <input type="checkbox"/> |
| 2. Two persons <input type="checkbox"/> | 5. Five persons <input type="checkbox"/> |
| 3. Three persons <input type="checkbox"/> | 6. Six persons <input type="checkbox"/> |
| 7. Seven or more persons <input type="checkbox"/> | |

3. How many of these people were—

(PLEASE WRITE IN NUMBER OF PERSONS IN EACH CATEGORY)

Number	Number
Adult men (18 years or more) _____	Teenagers (13-17 years old) _____
Adult women (18 years or more) _____	Children (12 years old or less) _____

4. How much time did you and your party spend in Niagara-on-the-Lake on this trip?
- | | |
|--|--|
| 1. Less than 3 hours <input type="checkbox"/> | 4. Stayed 2-4 nights <input type="checkbox"/> |
| 2. 3 hours to 1 day—but not overnight <input type="checkbox"/> | 5. Stayed 5-10 nights <input type="checkbox"/> |
| 3. Stayed 1 night <input type="checkbox"/> | 6. Stayed more than 10 nights <input type="checkbox"/> |
5. If you were towing a trailer, what type was it?
- | | |
|---|---|
| 1. Camping trailer <input type="checkbox"/> | 3. "Mobile home" <input type="checkbox"/> |
| 2. Boat trailer <input type="checkbox"/> | |

6. What was the primary reason for this visit to Niagara-on-the-Lake?
(PLEASE CHECK UNDER THE LEFT COLUMN BELOW)

7. What were your secondary reasons for visiting Niagara-on-the-Lake?
(PLEASE CHECK UNDER THE RIGHT COLUMN BELOW)

Reasons—Questions 6 & 7

	Primary Reason for Visit	Secondary Reason for Visit
1. Shaw Seminar.	<input type="checkbox"/>	<input type="checkbox"/>
2. Picnicking.	<input type="checkbox"/>	<input type="checkbox"/>
3. Business.	<input type="checkbox"/>	<input type="checkbox"/>
4. Personal or family affairs.	<input type="checkbox"/>	<input type="checkbox"/>
5. Shaw Festival Productions.	<input type="checkbox"/>	<input type="checkbox"/>
6. Just vacationing.	<input type="checkbox"/>	<input type="checkbox"/>
7. Passing through.	<input type="checkbox"/>	<input type="checkbox"/>
8. Shopping.	<input type="checkbox"/>	<input type="checkbox"/>
9. Visiting friends or relatives.	<input type="checkbox"/>	<input type="checkbox"/>
10. Shaw Film Festival.	<input type="checkbox"/>	<input type="checkbox"/>

Other reasons (PLEASE WRITE IN) _____

8. Please check the communities which you visited or passed through ON THIS TRIP.

Stopped Passed through

1. Niagara Falls, Ontario.....	<input type="checkbox"/>	<input type="checkbox"/>
2. Niagara Falls, New York.....	<input type="checkbox"/>	<input type="checkbox"/>
3. Windsor.....	<input type="checkbox"/>	<input type="checkbox"/>
4. Barrie or north.....	<input type="checkbox"/>	<input type="checkbox"/>
5. Peterborough.....	<input type="checkbox"/>	<input type="checkbox"/>
6. Toronto.....	<input type="checkbox"/>	<input type="checkbox"/>
7. Stratford.....	<input type="checkbox"/>	<input type="checkbox"/>
8. Montreal.....	<input type="checkbox"/>	<input type="checkbox"/>
9. St. Catharines.....	<input type="checkbox"/>	<input type="checkbox"/>
10. Rochester.....	<input type="checkbox"/>	<input type="checkbox"/>
11. Hamilton.....	<input type="checkbox"/>	<input type="checkbox"/>
12. Buffalo.....	<input type="checkbox"/>	<input type="checkbox"/>

Other communities visited on this trip_____

9. Please (X) each of the facilities you and your party used while you were in Niagara-on-the-Lake ON THIS TRIP, and in entire trip.

Facilities used Facilities used
in N.O.T.L. in entire trip

1. Shaw Festival Theatre.....	<input type="checkbox"/>	<input type="checkbox"/>
2. Hotel room(s).....	<input type="checkbox"/>	<input type="checkbox"/>
Motel room(s).....	<input type="checkbox"/>	<input type="checkbox"/>
Friend's home.....	<input type="checkbox"/>	<input type="checkbox"/>
Trailer camp.....	<input type="checkbox"/>	<input type="checkbox"/>
Parks.....	<input type="checkbox"/>	<input type="checkbox"/>
Picnic areas.....	<input type="checkbox"/>	<input type="checkbox"/>
3. Service stations.....	<input type="checkbox"/>	<input type="checkbox"/>
Brewer's retail stores.....	<input type="checkbox"/>	<input type="checkbox"/>
Public beverage rooms.....	<input type="checkbox"/>	<input type="checkbox"/>
Liquor store.....	<input type="checkbox"/>	<input type="checkbox"/>
Restaurants or dining rooms.....	<input type="checkbox"/>	<input type="checkbox"/>
4. Marina.....	<input type="checkbox"/>	<input type="checkbox"/>
Golf course.....	<input type="checkbox"/>	<input type="checkbox"/>
Movie theatre.....	<input type="checkbox"/>	<input type="checkbox"/>
5. Hospital.....	<input type="checkbox"/>	<input type="checkbox"/>
Doctor or Dentist.....	<input type="checkbox"/>	<input type="checkbox"/>
Drug store.....	<input type="checkbox"/>	<input type="checkbox"/>
6. Grocery store.....	<input type="checkbox"/>	<input type="checkbox"/>
Hardware store.....	<input type="checkbox"/>	<input type="checkbox"/>
Clothing store.....	<input type="checkbox"/>	<input type="checkbox"/>
Other stores.....	<input type="checkbox"/>	<input type="checkbox"/>
7. Swimming pool.....	<input type="checkbox"/>	<input type="checkbox"/>

Other facilities not listed (PLEASE WRITE IN)_____

10. What recreational activities did you or your group undertake in Niagara-on-the-Lake ON THIS TRIP?

1. Picnic ☐
2. Golfing ☐
3. Festival Theatre ☐
4. Movie ☐
5. Boating ☐

6. Swimming ☐

7. Tennis ☐

Other (PLEASE WRITE IN)

11. Please check the category which best expresses your feelings concerning each of the following services in Niagara-on-the-Lake.

	Excellent	Good	Fair	Poor
	1	2	3	4
Hotel/Motel accommodation.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of restaurant food.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of restaurant service.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of dining rooms.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service stations.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment facilities.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recreational facilities.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tavern.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cocktail lounges.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attitude of local people towards visitors.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local prices of goods and services.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Camping facilities.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children's facilities.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Closing hours.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shops & Stores.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. If you did not stay overnight in the immediate vicinity of Niagara-on-the-Lake, was it for any of the following reasons? (PLEASE CHECK)

1. Lack of campsites and trailer facilities..... ☐
2. Lack of "things to do" in Niagara-on-the-Lake..... ☐
3. Lack of motel/hotel accommodation..... ☐
4. Returning home the same night..... ☐
5. Had not thought of Niagara-on-the-Lake as a place to stay ☐
6. Other reason (PLEASE SPECIFY)_____

13. Was this your first trip to Niagara-on-the-Lake?

1. Yes ☐

2. No ☐

14. Please check each of the following points of interest you visited.

1. Niagara Falls ☐
2. Lake Erie ☐
3. Fort George ☐
4. Fort Mississauga ☐
5. Historical houses & buildings ☐

6. Butler's Burial Ground ☐
7. Queenston Heights ☐
8. Museums ☐
9. Local Churches ☐

15. How was the city of Niagara-on-the-Lake first brought to your attention?

1. Shaw Festival Theatre ☐
2. Word-of-mouth ☐
3. Advertisements or brochures ☐
4. News media ☐

5. Family or friends ☐
6. Business contacts ☐
7. Television or radio ☐

16. Do you plan to visit Niagara-on-the-Lake again for any of the following reasons?
- | | | | |
|---------------------|--------------------------|----------------|--------------------------|
| 1. Festival Theatre | <input type="checkbox"/> | 6. Pleasure | <input type="checkbox"/> |
| 2. Business | <input type="checkbox"/> | 7. Shopping | <input type="checkbox"/> |
| 3. Personal | <input type="checkbox"/> | 8. Simcoe Ball | <input type="checkbox"/> |
| 4. Vacation | <input type="checkbox"/> | 9. House Tour | <input type="checkbox"/> |
| 5. Recreation | <input type="checkbox"/> | | |
17. What was the approximate total expenditure of your party on the entire trip enroute to and including Niagara-on-the-Lake? \$ _____
18. What was the approximate total expenditure of your party on this trip in Niagara-on-the-Lake? \$ _____
19. Would you please indicate the approximate total expenditure of your party on this trip for EACH of the following categories:
- | | | | |
|------------------|-------|--------------------------|-------|
| Food & beverage | _____ | Entertainment | _____ |
| Gift merchandise | _____ | Attractions | _____ |
| Festival tickets | _____ | Personal use merchandise | _____ |
| Accommodation | _____ | Shaw Seminar | _____ |
- Would you please indicate the approximate expenditure of your party on this trip in NIAGARA-ON-THE-LAKE for EACH of the following categories:
- | | | | |
|------------------|-------|--------------------------|-------|
| Food & Beverage | _____ | Entertainment | _____ |
| Gift merchandise | _____ | Attractions | _____ |
| Festival tickets | _____ | Personal use merchandise | _____ |
| Accommodation | _____ | Shaw Seminar | _____ |
20. Into which of the following age groups do you fall?
- | | | | |
|--------------------------------|--------------------------|--------------------------------|--------------------------|
| 1. Under 20 years old | <input type="checkbox"/> | 3. Between 35 and 49 years old | <input type="checkbox"/> |
| 2. Between 20 and 34 years old | <input type="checkbox"/> | 4. 50 years and over | <input type="checkbox"/> |
21. To guide us in placing advertisements and in our public relations, what is your occupation?
 Type of work: _____
 Type of company: _____
22. How many times have you been in the Theatre, Town, Area:
- | | | | |
|------------|--------------------------|---------|--------------------------|
| 1. Theatre | <input type="checkbox"/> | 3. Area | <input type="checkbox"/> |
| 2. Town | <input type="checkbox"/> | | |
23. Please indicate in order of preference, your interest in the Shaw Festival.
- | | | | |
|----------------------|--------------------------|------------------|--------------------------|
| 1. Stage productions | <input type="checkbox"/> | 3. Film Festival | <input type="checkbox"/> |
| 2. Seminar | <input type="checkbox"/> | | |
24. What additional attractions would you like to see at the Shaw Festival?

25. Which time would you prefer for the performances?
- | | | | |
|----------------------|--------------------------|----------------------|--------------------------|
| 1. Evening—7:30 p.m. | <input type="checkbox"/> | 2. Matinee—2:00 p.m. | <input type="checkbox"/> |
| 8:00 p.m. | <input type="checkbox"/> | 5:00 p.m. | <input type="checkbox"/> |
| 8:30 p.m. | <input type="checkbox"/> | | |
26. Did you find it difficult to get to Niagara-on-the-Lake?
- YES ☐ NO ☐
- If YES, please elaborate:

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